Five Simple Steps

A Pocket Guide

Interviewing for research

by Andrew Travers

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Introduction

Empathy. We're often told that it's the key quality in a user experience designer. But where does empathy come from? A natural predisposition, an affinity? Maybe, but I think it's learned, something we accumulate over time; from talking to people, asking them questions, listening to their responses, understanding their behaviours; challenging our own unavoidable biases, what we've previously understood to be true.

User experience designers do so many things, but research is, for me, absolutely central to what we do and the contribution we offer to a design process. But the impact of good research, and knowing what it takes to conduct research well, is often underestimated. Perhaps because it relies on something we think to be an innate skill – holding a conversation – we can forget both how valuable interviewing can be and how hard. It can be seen, wrongly, as time-consuming and costly. Interviewing can be a missed opportunity, even when it is done, seen by client and design team alike as window dressing, a nebulous discovery phase disconnected from the real design process that comes after.

This short guide to interviewing sets out five simple steps not only to make the most of the interview itself but what comes before and after it, too; how to make sure you're talking to the right people, focusing on what's most important, and – critically – using insights from interviews to drive design decisions. It's there for before, during and after the interview.

Structure

This pocket guide is divided into five parts.

1. **Recruiting**
   How to write an effective recruitment brief and find the right research participants.

2. **Preparing**
   Writing a discussion guide and getting ready for the interview.

3. **Conducting**
   Making the most of the interview.

4. **Documenting**
   What to record, and how.

5. **Synthesising**
   How to move from collected observations towards insights that drive design decisions.

This is a pocket guide, and as such, it doesn’t attempt to cover every scenario, every technique, but instead offers sound and unfussy guidance on thinking about research interviews. It doesn’t specifically cover ethnographic or remote research, or usability testing, though many of the techniques to be found here apply.

It necessarily makes some assumptions, too:

- Recruitment of interviewees is done through a third party.
- You work in-house or in an agency (or freelance in either).

For brevity, I've used *client* to describe the group of people who commissioned the work, whether that be the business you work for, or the business you won the pitch to work with; I use *design team* to mean the group of people you are working alongside to tackle a design problem for the client, whether they are in an agency or within a business.

1

Recruiting

Before the interview comes the recruitment. Whether you are doing it informally or formally, finding the right people matters – it can make the difference between following a blind alley or capturing insights that can transform a design project.

Recruiting for research is a balancing act. Coming at an early stage in a typical project process, it can be an important test of the fledgling relationship between commissioning client and design team. It can be political and require negotiation. It's easy to get wrong, to pursue a direction that doesn't meet the brief, to get waylaid by internal politics and find yourself interviewing the wrong people about the wrong subject matter. So, it's vital to spend time up-front discussing and planning the research activity, to determine:

- The expectations for the research: what's the design problem you are investigating?
- How the findings from the research will be used: understanding the audience for the research – whether that's an organisation's leadership, or its design team – and what they'll do with it, should determine the best format to deliver your findings.
- How and when the research will be conducted: the format (and formality) of the research, be it guerrilla or in a formal lab environment.
- Who you need to talk to, inside and outside of the organisation.

Think about treating the research element of your project as a self-contained project in its own right, and do what you'd do for any project: define the scope of the research, its objectives, risks, measures of success and the timeline that the research needs to be delivered against. That definition is there to help both you and your client. It provides clarity on the design problem you want to inform through research, the profile of the research participants, and a means of measuring the contribution of the research to the design problem. Without it, you may leave yourself open to the risk of a misaligned research brief and recruiting the wrong participants or having the wrong participants forced on you.

The insiders

Stakeholders, that odd catch-all description we use for interviewees within the organisation, are typically the most readily accessible source of research insight and can provide highly valuable domain expertise and insight into the inner machinations of a business. Interviewing within an organisation can form an unintended part of the project theatre too – a way of communicating the intent of the project itself, giving the commissioning client the precious attention of senior staff, and helping to create commitment internally to the project. For this reason, interviewing within the client organisation is sometimes political. As a researcher, you may be asked to interview people who don't necessarily fit your research profile, but can affect the likelihood of the project being realised. Goodwill and confidence are the lifeblood of any successful project and a little pragmatism can go a long way.

To avoid the more political interviews being at the expense of those within the organisation you know you need to speak to, it's worth spending time preparing a recruitment brief for internal, as well as external, research participants: a way of reiterating the design problem you're trying to address and finding the people to help you answer it. Agreeing this research brief with your client allows you to establish the grounds on which you will accept participants from outside the research brief, but not in place of it.

The outsiders

At first glance, recruiting external research participants can seem daunting. Projects often recruit in one of three ways: through the organisation's existing user base (where existing customers are the focus of the research); via a third-party research recruitment firm; or – where needs must – informally through social networks and contacts.

If you don't have budget formally allocated for research, don't let that stop you finding ways to make the voice of your target audience heard. Use your social networks, run snapshot surveys, and get out of the studio to talk directly to the people you are designing for.

Using the existing customer base might appear the easiest route, but it calls for the same rigour you'd apply to working with an external recruiter, in particular to avoid speaking only to the customers that the organisation perceives to be positive towards the product or service, or participants who are frequent contributors to the organisation's internal research.

Recruiting participants directly is preferable, giving the design team more scope to recruit from outside the existing customer base, invite fresh perspective and exert finer control over the recruitment profile. Recruitment costs typically involve two parts: an incentive for the participant and a fee to the recruiter. Incentive costs will vary regionally and internationally, and depending on the complexity of the recruitment brief. For example, at the time of writing, in London you might expect to pay around £40–50 per participant and the same again in an incentive fee for a one-hour interview.

When working with a recruiter, it's critical to make sure they understand the brief and the underlying rationale, and help them identify where they can best lend their expertise, particularly around designing a screener that identifies the types of people you do want to interview, and those you don't, as well as the aspects of the brief that are mandatory, and those that just desirable.

Think about how you might describe your would-be interviewees. Take these two short descriptions:

> *"Guardian-reading women in the north-west of England."*

> *"Degree-educated women, living in a major city outside London, interested in current affairs, identify politically with the Labour Party or Liberal Democrats."*

One's a type; the other's a profile. The first is shorthand – the sort of thing we might use in conversation; the second is broader in scope yet also more specific, an unpicking of the former's characteristics. This doesn't just give a recruiter more room, but also clearer direction, allowing us to separate what, for the purposes of your particular brief, might be essential (an interest in current affairs, a location outside London) from the merely desirable (identification with a political party).

Relationships with recruitment partners are built over time, and by working with a small selection of partners you'll develop a sense of where their strengths lie. Key to this is talking to the recruiter. Before and after you send a brief. Before, during and after the recruitment and the interviews.

To the good recruiter, this feedback is invaluable and helps them to respond when – and it will happen – a participant doesn't meet your profile as well as hoped or is a poor interviewee.

So-called professional research participants may give false information in a screener to be selected (and paid) for taking part in research. They are both inevitable and avoidable. I interviewed Nina Belk, a user research manager at *LBi*, and she gave me three tips on how to deal with them:

- **Ask for ID**. Professional participants sometimes resort to pseudonyms to bypass a screening process.
- **Pause or terminate the interview.** If you get a sense during an interview that the participant isn't being communicative,

constructive or genuine, take time out from the interview and discuss the situation with a fellow researcher or with the client (if either are available). Don't be afraid to shut the interview down. It's not in your interest, and you don't have time, to pursue an interview that isn't working and isn't going to be useful to you.

- **Tell the recruiter.** Professional or unhelpful research participants are frustrating, but the best way to deal with them is to the discuss what happened with the recruiter. Their reputation depends on providing you with good people, so help the recruiter filter out poor participants and avoid selecting them in future.

2

Preparing

When you're new to interviewing, it can be tempting to overscript your interview questions in an attempt to be precise with your wording and remove any room for error. It's tempting but it's also a mistake. The best interviews find their own flow, and your questions need to go with it.

The more you script, the more you'll find yourself asking questions that feel stilted and forced, and the more you end up waiting for an interviewee to hurry up and stop talking so you can ask the next question on your list. Scripting makes it harder to react to an interviewee's answer, to follow up and pursue a particular line of enquiry.

Better, then, to develop the ability to phrase and develop questions in the moment than to memorise a sequence of questions. Instead, I suggest creating a discussion guide: broad headings for a conversation that I know I'll need to cover, but which might encompass a number of individual points or prompts. In *Mental Models*, Indi Young recommends not phrasing these prompts as questions, to avoid merely reading them out as questions under pressure in the interview.

Find a logical structure to the topic areas – going from broad to narrow for example, or from attitudes and beliefs to behaviours and needs – to create a rhythm and flow to your interview, but don't be afraid to deviate from it and circle around the topic areas as suits the interviewee's conversational style. Let the interaction between you and your interview find its natural course. How you structure your interview will be influenced by where your research comes from, whether you are engaged in testing a previously established proposition or hypothesis, or using a using the research process itself to establish one.

Location, location, location

Interviewing in person is always preferable to remote research, but you won't always have the choice – an overseas client, a remote research base, or simply insufficient budget. When interviewing by phone, web conference or VOIP (services like Skype or Google Hangout), don't expect an in-person format to translate seamlessly. Call quality and latency, fewer non-verbal cues and opportunities for positive listening all make for a very different interviewing experience. Think about simplifying how you ask your questions, be explicit, cut down on subclauses in sentences, be ever more succinct.

Using stimulus materials

Beyond the conversation itself, you should consider how else you might want to capture information. For example, if your research involves subject matter that can be hard to conceptualise, then think about using props to help both interviewer and interviewee explain an idea. This might include:

- Timelines: plotting how a product or service is used over time.
- Ecology mapping: how and where a product or service is accessed and used in different places; for instance, where an interviewee listens to radio, in and out of the home.

- Decision trees: a simple card sorting exercise to help an interviewee explain their thought process or mental model.

Be careful, however, not to let this material become the focus of the interview. Don't fetishise the materials or become too precious about how they are used or presented – they're props, there for the benefit of the interviewee.

Getting ready

There's no magic formula when planning interviews, and no rules about the number of interviews you do in a day, the length of the interview or how you capture it. Do what works for your project, your interviewees and the way you prefer to work.

Interviewing is tiring. Interviewing with travel is draining. Fatigue can be an issue, so plan accordingly. Don't be too ambitious with the number of interviews you can manage in a single day. When I interview in one location, I try to avoid more than five interviews in a full day, giving me an hour between most interviews to catch my breath and my thoughts.

Think about the space you are interviewing in – I usually try to sit at ninety degrees to my interviewees rather than confrontationally opposite them, or uncomfortably next to them. If you are interviewing in a set location, it's important the interview environment works for you as well as the interviewee. Think about how to keep things fresh, making subtle adjustments between interviews, like rearranging the chairs in the interview room so it doesn't become visually repetitive for you and prevents multiple interviews blending into one.

Think, too, about yourself. When interviewing internal stakeholders, don't dress in imitation of your interviewees' work dress norms, but don't make them feel uncomfortable by dressing too casually or smartly. Show participants the respect they deserve: don't rush from one to the next. Be on time, finish on time. And, finally, look after yourself – don't overload on coffee and biscuits during a day of interviews as your energy will peak and trough. Stay hydrated, get fresh air, get up, stretch and move around between sessions.

Preparing the interviewees

If you have the opportunity to communicate with interviewees ahead of the interview, do so. An email in advance of an interview is a chance to introduce yourself, your company, the background to the interview, and to help the interviewee feel relaxed and confident. Normally, this is simply a matter of reassuring interviewees that they don't need to specifically prepare for the interview and explaining how their feedback will be used.

3

Conducting

Spending time with people, understanding their world and uncovering their needs is a privilege. To make the most of the precious opportunity that interviewing presents, we need to think of it as something other than an everyday chat. And conducting a good interview is hard, hard work.

When speaking to others, it's natural to want them to like us, but a research interview isn't the place to do it. When responding effusively to an interviewee – "That's great!" – you risk inadvertently drawing the interviewee into saying what they think you want to hear. It's difficult to resist but try to position yourself as neutral and naive, an outsider filled with curiosity. It's just about possible to be reserved but friendly, to listen positively without overreacting. My own approach is to remain as neutral as possible during the interview itself, leaving it until the end of the interview to thank the interviewee more expressively for their participation, and to offer genuine thanks for their time.

Focus on what people do

When you are designing a new product, even if it's just a new app or website, it's tempting to ask users about what they *might* do. However, this really belongs in the realm of market research and focus groups rather than user experience research. Avoid asking people to speculate about future behaviours – they don't (and can't) know – and seek instead to understand how they behave now and, by extension, how those behaviours might change and adapt over time.

This doesn't mean that we then design down to current behaviours (part of the myth that user experience designers don't do innovative design), but that we understand those behaviours, and design accordingly, whether that challenges and changes those behaviours over time or seeks to work with them.

Be specific

When interviewing, always look to drill down into the interviewee's motivations and behaviours. *5 Whys*, a technique originating in Toyota's production system, is one model for uncovering underlying cause and effect. The initial answer to a question might be only part of the story – asking why again can start to reveal the reasons behind it.

> *When did you last buy music online*?
>
> I don't buy music online.
>
> *Why do you think that might be*?
>
> I rarely see something I want.
>
> *Why is that?*
>
> Well, I used to buy albums, but find I just pick out individual tracks these days.
>
> *How do you go about finding those tracks*?
>
> I listen to BBC 6 music and then find and favourite them on Spotify.

Here, someone who we might have categorised simply as ‘doesn’t buy music online’, turns out to stream music and pay indirectly via Spotify.

Research interviews rely on the quality and accuracy of their interviewees. One of the challenges of interviewing is mitigating against an interviewee unintentionally but inaccurately describing their own behaviour: self-reporting error. Part of this relates to the interviewing environment you create, and how much you can put your interviewee at ease and able to share openly with you. But watch out for interviewees generalising or using absolutes: “I always…”, “I never…”.

Gently challenge these by seeking tangible examples:

> *When, recently, have you done something like that*?

> *Can you talk about a time when…?*

Don’t lead, don’t close

Asking leading or closed questions is a perennial worry for a researcher, and while it may get easier with experience it will remain a challenge however regularly you interview. I find myself doing this when I’m tired and nearing the end of a long day of interviewing (hence the need for regular breaks).

Leading questions proffer the answer within the question; closed questions suggest yes or no answers; both close down the space the interviewee has to answer.

Leading: You don't buy music online, do you?
Closed: Have you bought music online within the last fourteen days?
Open: Can you tell me about a time recently when you've bought music online?

Avoid offering an answer in your question. "Would it be better if there was an app for that?"

Listen, observe, reframe and… pause

Interviewing is as much looking as listening – not just hearing the words spoken, but observing how they are said. A deep sigh, an uncomfortable shift, losing eye contact, a wry half-smile.

How a question is answered can tell you as much as what is said. That's why the most critical moments in an interview occur not when you are asking a question, but during the work you do when someone else is talking.

Silence is an great tool for interviewers. Chris Noessel, in a piece for Cooper, suggests leaving *four seconds of silence* after an interviewee has replied, just enough time for them to process what they've said and add to it. As Chris says, a tactical sip of water or note-taking avoids you sitting awkwardly staring at the interviewee. Leaving these gaps has another benefit too: helping to avoid a sense of rushing the interview, a chance for you to take a moment to think about where you are in the interview and where to go next. It's another reason to avoid prescriptive lists of questions you feel compelled to tick off.

Reframing what an interviewee has just said ("So, it sounds like you're saying that…", "What I'm hearing is that…") isn't just about checking and validating what we think we've heard, but also allowing space for the interviewee to expand on the point, to clarify and add depth.

Don't solve the problem

It's neither your job, nor the interviewee's job, in a research interview to solve the problem there and then. Good interviewing is about gathering evidence, not trying to solve the problem in the room or, worse, to ask the interviewee to solve the problem for you. Research interviews aren't about crowdsourcing the answer to a problem.

It's not about you

In any social situation it's natural to want to be liked, to impress someone with your ability or knowledge, but there's a difference between domain knowledge and showing off. Good interviewing isn't about demonstrating how clever you are, but giving the interviewee the space to tell their story and let you into their world. Being a good interviewer doesn't mean being an expert: it means knowing the right questions to ask.

Getting into an unspoken battle about who knows most defeats the purpose of the interview. Instead, play the novice, ask the naive questions – and in turn, allow your interviewee to share what they know with you, to be the expert, and to feel good about sharing it with you. This can be particularly helpful with difficult interviewees, and help them to open up.

"Can you say more about that?"

This is my favourite interviewing question and here's why. It's just six words long. It's unobtrusive and humble. It's encouraging and it's to the point. It's a question Melvyn Bragg uses often on *BBC Radio 4's excellent In Our Time* in which he speaks to historians, scientists and philosophers about key moments in our history. This question is Bragg's way of quietly cajoling his contributors, of getting more depth – like those 5 Whys. He's playing the naive interviewer to their professional expert, but what he's actually saying is, "I know there's more in that – that's not enough, I need you to give me more." Yet it sounds like "You're saying really interesting things. Keep talking." An encouragement. Clever.

Dealing with difficult interviewees

In his *The Blaze of Obscurity*, Clive James identifies three types of interviewees: "normal human beings", "the walking disasters" and "the self-starters". You need to watch for two of these.

Some people are just harder to interview than others. The walking disasters, in research terms, can be difficult to prise open, on the defensive from the off, unwilling to engage, sometimes even openly hostile. They're also, happily, a rarity.

If the interviewee is an internal stakeholder, it's worth exploring the reasons for the hostility, if they'll let you. It might reveal some internal politics that it would be useful for you to be aware of, or past history that could affect your project's chances of success. If the interviewee has been recruited, however, end the interview. Don't waste an hour trying to engage someone who doesn't want to be there. Instead, let the recruiter know and move on.

By self-starters, James meant interviewees like Peter Ustinov or Billy Connolly: characters (I choose the word deliberately) who merely need to be told "Go", and can then talk for as long as you let them. Beware interviewees like this. Just like Ustinov and Connolly used to dance, Ali-like, around a metaphorical boxing ring, rarely letting their defences down and their opponent in, so self-starters conduct the interview on their terms, rarely letting an interviewer land a direct question and receive an answer to it.

Sometimes, subtle pressure – cutting down on the positive listening, stopping taking notes – can be enough. Other times, however, you might need to be more direct, to cut off and conclude a meandering contribution:

> *"You clearly have a lot of experience in this area, but I'd like to ask you now about..."*

> *"We've got a limited amount of time, so I like to make sure I cover some important areas in our discussion..."*

Whether it's flattery, coercion or a mixture of both, it's important you assert yourself enough to make the interview usable.

4

Documenting

Making the right decisions on how to document an interview often comes down to the audience for the research. What will be more persuasive to sceptical senior executives: your transcribed verbatim quotes that they can share and repeat; or the immediacy of audio of interviewees in their own words? Do the designers and developers you work alongside need just the top-level findings or will video clips best encapsulate the research?

Before you interview, think about how the information you gather is going to be used. If you (or your client) aren't going to watch hours of video footage, don't spend your time – and their budget – videoing the interview.

Projects are different, teams are different, and what they need is different – don't rush to assume one audience type needs one format. The right format is the one that's right for the team you deliver to. A post-session debrief directly with a client or an email quickly summarising findings to senior managers are no less valid or actionable than the exhaustive slide deck that takes days to assemble. Quite the opposite in fact.

Research manager Nina Belk describes how, in one project, she chose to limit findings to short end-of-day email summaries to the project's management and stakeholders, with selected highlights and key findings. For Nina and for her employers, it proved an incredibly viral way of sharing insight – insight the business had already gained elsewhere, but here made usable and easily shareable – by email rather than lying hidden, long forgotten, in a slide deck.

Regardless of how you choose to deliver your findings, plan to record the audio from the interview if you possibly can. I record, in part, to spare the effort of simultaneously transcribing and interviewing, but principally it's to allow me to focus on listening, to stay in the flow of the conversation and give the interviewee the kind of positive listening that keeps them engaged. It's also a vital future reference, even if the formality of the research doesn't necessarily call for it; for example, user research that is acted on immediately, with the client observing and followed by a debrief session.

I usually record simply using my phone, as it's unobtrusive, quickly ignored by the interviewee and convenient to listen back on. Voice memos, pre-installed on iOS, or *Easy Voice Recorder* for Android are both perfectly adequate for this purpose. Alternatively, *Livescribe smartpens* can record audio alongside the note you take so you can connect notes directly with the audio from an interview. *Pearnote* is a Mac OS X app that records audio on your laptop as you take notes, and *Silverback*, Clearleft's app more often used for usability testing, can be put to use here too, simply to capture interview audio.

Lastly, take photographs if you can. A photograph of an interviewee doesn't just help you keep track of whom you spoke to, it helps bring interviewees alive for those who couldn't be in the room with you. And on a wall in a project space they can become a part of your design process, a handy reference watching over you and your team as you sketch and developing your design ideas.

During the interview

Depending on how you've organised your research (and the available budget), you may be interviewing with a colleague or on your own. When working as a pair, I find it helpful to take on primary and secondary researcher roles, where one person leads and the second person supports and documents. This doesn't just benefit the research team, but helps in the interview itself to provide the interviewee with a single focal point for the conversation, and for the primary researcher and interviewee to build rapport and understanding.

If you work in a pair, don't let one person do all the talking. The secondary researcher has a critical role in supporting the primary researcher, able to follow up on areas of interest, spotting gaps, helping keep the interview on track. Rotating the roles between interviews can be a great way of keeping fresh and avoiding tiredness, too.

Whether you have an assigned note taker with you or not, and regardless of whether you're recording the interview, take some written notes. Over time I've started to focus these notes less on attempting to cover the whole interview, but on capturing just the moments that stand out from the interview; to remind myself of a point from a response for follow up; or for my own commentary that I want to capture. (My own approach is to mark these in square brackets so it's clear to me later that it was my thought, not their words.) They are notes that I can't expect a colleague to capture, or be certain that they will have picked up on a comment in exactly the same way.

A notepad also acts as a useful prop for creating a pause in the interview as you momentarily write something down, allowing the interviewee time to add to their reply.

After the interview

Immediately following the interview, take a little time to capture your sense of what has just happened: what the stand-out moments were, a memorable insight, a non-verbal cue you spotted. It might be in conversation with your fellow researcher or, if you're working alone, simply writing it down. Often in the course of an interview, the stand-out moments are immediately obvious, but this reflection helps process and clarify your thinking. This post-interview download is useful in clearing your mind before the next interview, but it's more than that – it's how you develop your interviewing technique, a chance to consider the flow of the interview, how you asked your questions, unexpected avenues in the interview you want to pursue further in subsequent interviews.

5

Synthesising

At the conclusion of a round of interviewing, the research team's minds will be filled with an enormous amount of information, conflicting ideas and different perspectives. The first job is one of reflection and storytelling, to get this out of the interviewers heads, on to walls and into the heads of the wider design team.

Too often designers and developers are removed from the process of synthesis, left with the conclusions rather than understanding the thinking that led to them. Whether it's for reasons of project efficiency or perceived indifference, telling the story of an interview can be a highly valuable way of sharing what you hear, allowing designers and developers into the research process, giving them permission to ask questions, to challenge and to understand. It shifts an interview from being the property of the interviewers to that of the design team as a whole. And just like the process of immediately capturing initial reactions post-interview, so this storytelling – a reflection on reflection, as it were – becomes a way of further processing and developing your own thinking.

For a project I worked on with a financial services firm, our research team used storytelling in a stand-up format with the wider design team. Not only did it keep the feedback succinct and to the point, but it provided my fellow researchers with a way of sharing our interviews with staff and customers in the days directly after they happened. This allowed the wider design team the opportunity to query what we'd found, to suggest areas for exploration and begin to discuss and explore the issues raised. With a heavy interview schedule, it kept the whole team involved and able to begin processing the information gathered from the research, rather than waiting for its conclusion.

Processing

Processing begins while the research is in progress, and it's important to take the time to return to the interviews, to immerse yourself in the conversations once more. Listening back is a valuable opportunity to compare what the interviewees told you then with what you know now about the design problem. As with your reflection time immediately after an interview, use it to learn about yourself and develop your interviewing instincts, too – to evaluate how you ran the interview, topics for discussion you may have overlooked, or new areas for exploration in future interviews. But bear in mind that what felt important in the room probably was, an instinct you'll refine over time.

Often, finding the time to listen back to interviews isn't easy. Project plans are rarely generous enough to support this kind of refection and I find myself listening back to interviews wherever I can, on my daily commute or traveling to a subsequent interview (another reason to record using your phone, perhaps).

On large research projects or where a distributed research team is involved, transcribing interviews may become important, a means for the team to build and share an deep knowledge of the content of each the interviews. Transcription is onerous and it inevitably loses at least some of the nuance of the interview along the way, like how a question was answered, not just what was said – a reason for relying primarily on interview audio wherever practicable.

When I listen back to an interview I do so with a marker pen and copious Post-it notes, capturing points of interest, quotes, emerging themes and questions for the team to consider. And what I capture then informs what comes next: developing profiles and personas, affinity mapping and ideation.

Affinity mapping

To apply some structure to the information gathered, researchers often turn to affinity mapping (or affinity sorts). *KJ-Method* is one particularly well-structured approach, a means of deconstructing then reconstructing interview feedback. Using the audio from the interview, points of interest from the interview are written down on Post-its on the wall, put up in an unstructured fashion, before the lens of the design problem the research set out to explore is brought to bear in identifying recurring patterns or groupings amongst the Post-it notes. Groups are then named, voted on and ranked in order of importance. Approaches differ in the level of interaction permitted between researchers as this exercise is completed, but its essence remains the same – reach consensus through collective brainstorming, apply structure to interview data, and vote up areas of priority.

Mental models

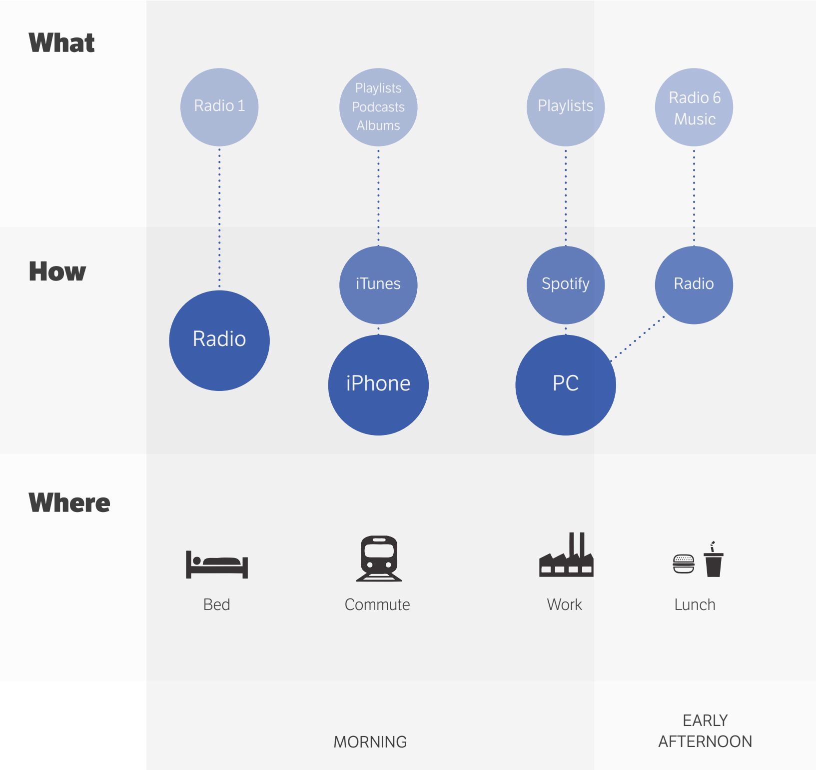
A similar application of structure is used in the construction of mental models: extracting discrete tasks from the interviewee's responses; and then identifying common groups (task towers) and connected groups (mental spaces) for groups of tasks. Indi Young's *Mental Models* describes the process in detail, along with how to map mental models to a product's or service's content and functionality.

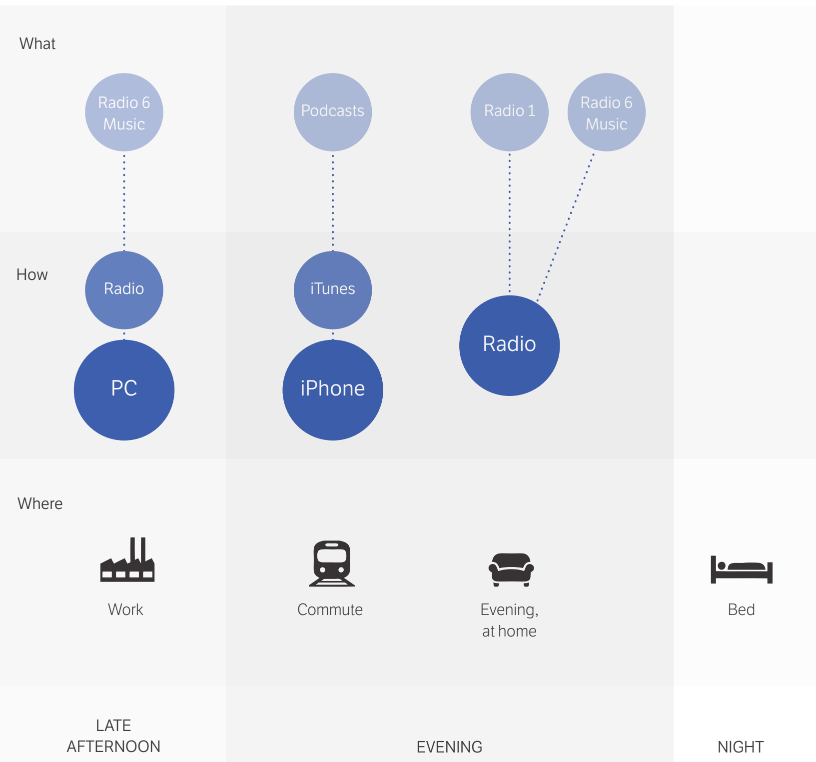
Visualising stimulus material

If you made use of stimulus material in your interviews (see chapter 2), it's at this point in the process that these timelines or maps can provided a more structured way of bringing together interview responses. For example, if you were researching listening habits, you might illustrate this in a number of ways depending on the emphasis of the research:

- A timeline of when and where an interviewee listened to music over the course of a day: walking to the train station in the morning; on a train; with others in the evening.
- A diagram of the rooms in their home they listened to music in.
- Combining interview feedback to visually represent common behavioural trends.

Using visual stimulus to capture when an interviewee listens to music during a typical day.




What
Radio 6 Music
Podcasts
Radio 1
Radio 6 Music
How
Radio
iTunes
Radio
PC
iPhone
Where
Work
Commute
Evening, at home
Bed
LATE AFTERNOON
EVENING
NIGHT

Writing up

We need to talk about quotes. They are, quite understandably, the currency of interviews, the things that get blown up into 48pt Helvetica, given pride of place in our slide decks and research reports. But, as we've already reflected, quotes are only ever part of the story and a partial retelling of an interview. Like live-tweeting a conference talk, quotes are a useful hook but they lack context and can obscure and even confuse the wider meaning.

An interview isn't a competition for most eloquent interviewee, but too often this is exactly what happens – we gravitate towards the people who are most quotable. They aren't always the most insightful. As discussed in the previous section, what an interviewee says is only ever part of the story; it's a much more complex mix of what they said and how they said it; even, sometimes, where they said it. I've conducted interviews where one of the key insights was gleaned from how the interviewee was dressed and the office they worked, and what I could infer from that about the organisation's attitude towards its customers. There was no easy soundbite there.

Instead, the way we report back interviews, in whatever format, needs to balance those verbatim quotes with a more narrative approach, describing what we saw as well as what we heard, to create a more rounded picture of our interviewees, not just disembodied voices.

In research projects, I've often used a third-person subjective narrative mode as a device to convey a fuller sense of what an interviewee has told me without relying solely on individual quotations. These can be as short as 150–200 words. For example, an excerpt might read something like this:

> *"It's been eighteen months since James made the decision to leave his full-time job in the city to run his own business. He couldn't have picked a worse time to start up, he says. He knows the burden he's placed on his partner to bring in steady money has been a heavy one, but the support he's had from friends and family when he's needed it have pulled him and his partner through."*

However you capture an interview, the contribution that any interviewee makes needs to be treated with respect: maintain the anonymity that you conducted the interview in, and where you use quotations,you need to do so truthfully, not massaged or finessed. It's unacceptable to misrepresent what an interviewee said, or tidy up their thinking on their behalf. There's a truth in messiness, an authenticity of hearing a voice unfiltered – don't interfere with that.

Sometimes it's as simple as getting out of the way. I was fortunate to work on a project with *designer and researcher Leisa Reichelt* for a charity that aims to help the most vulnerable in society, those with the poorest literacy skills and difficult personal circumstances. In sharing our research with the client team, Leisa presented back the interviewee's words in near silence, without interpretation or analysis. It was all the more raw and direct for doing so, letting an emotive subject matter speak for itself, allowing the client to get closer to those interviewees by themselves, without us unnecessarily speaking on their behalf.

Profiles and personas

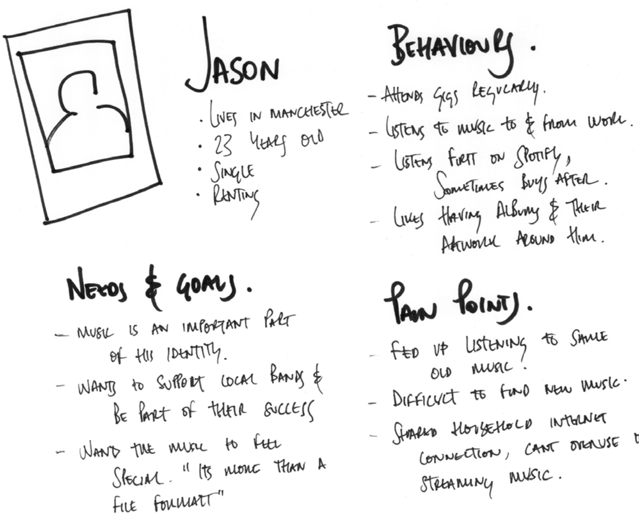
One way of achieving balance between quotations and narrative is to create profiles of your interviewees, early stage proto-personas that capture not just what they said but identify some of the motivations and behaviours your interview may have uncovered. Good profiles form the basis of creating personas: archetypes that represent audience segments.

The art of creating personas is beyond the scope of this guide, but Kim Goodwin's tour de force *Designing for the Digital Age* is an extraordinary resource to draw on throughout the design process and particularly on personas. As is, of course, *Alan Cooper's work*. Cooper first introduced the concept of personas in *The Inmates Are Running the Asylum*, and *About Face* remains an essential part of any interaction designer's library. For a leaner approach, Janice Fraser's *Luxr Persona Cheat Sheet* is extremely useful – a rapid means of capturing a single page persona, in four parts. The format is flexible but typically captures:

- Demographics: information about the individual, age, family, interests.
- Behaviours: what they are doing now.
- Pain points: relevant issues or problems they experience.
- Needs and goals: what they're trying to accomplish.

While formal personas don't work for every design team, making some tangible representation of the interviewees available to the design team is, I believe, critical – a reflection of the user's voice and perspective, a focal point for reference and discussing design decisions, without falling back on subjective opinion. Don't leave them to fade from memory in a slide deck: they belong on the wall.

An example of a one-page persona.



Hypotheses over recommendations

Often design research concludes in the presentation of findings to your client: a series of themes, perhaps, some recommendations and next steps. It's how I've concluded almost every piece of research I've conducted over the years. And I think it's perhaps time we stopped.

In *"My Recommendation: Stop Making Design Recommendations"*, an article for Johnny Holland, Jared Spool writes about the inherent dangers of this approach:

> *"Making the move away from recommendations is very hard. As I said, making recommendations is the easy way out, so it feels like the best path. But, in the long run, it's a trap. The house odds are against you and eventually, it will all come crumbling down."*

Spool argues that the better approach is to make suggestions, to *suggest experimentation*. I like both the implied humility and the intent to suggest a course of action. Something similar can be felt in the spirit of *IDEO's design thinking approach*, asking "how might we…" as a means of moving from findings to opportunities to suggesting possible solutions. But I'd like to go a little further, to suggest that we can better connect our research with our design by taking our research and these suggested experiments and forming new design hypotheses.

In *Lean UX*, Jeff Gothelf describes the following format for a design hypothesis:

> *"We believe that [doing this] for [these people] will achieve [this outcome]. We'll know this is true when we see [this feedback or measurable insight]."*

Better than high-level aspirational recommendations, visionary principles or even suggested experiments, I'm drawn towards Gothelf's hypothesis construction because it is explicit, it's tangible and it's testable. It gives us a point from which to begin, a meaningful design direction.

If we've begun our research with a hypothesis in mind – inductive research – then we're challenging, informing and refining that hypothesis. If we've begun in a more deductive fashion, we're creating an idea to coalesce around.

Conclusion

Interviewing is a privilege. Whether we're understanding a business from the inside out, or gathering the insight of the people we are ultimately designing for, we need to do justice to the opportunity that an interview presents. To do this means avoiding research becoming disconnected from the wider design process, and being an integral part of it.

- Let interviewees find their voice, don't box them in with a constraining interview format, but find the way to let them their own story.
- Don't own the research, but instead seek opportunities to share and involve others as soon as you can and involve them in your discovery.
- Focus less on formal deliverables and more on storytelling, on painting a fuller picture of the interviewees and their needs both for your fellow designers and your client.
- Don't let your research conclude in passive themes or broad recommendations, but instead actively seek ways to keep it alive.
- Research should form the basis of a design hypothesis, a tangible expression of a belief to be tested, measured and learned from.

@

Resources

I'm indebted to the work of many people, those I've worked with and for, and the writers who've done much to define how we do design research. Some of their books and blog posts which have influenced this short guide, whether directly or indirectly, are listed here.

Books

- *Designing for the Digital Age* by Kim Goodwin
- *About Face 3* by Alan Cooper, Robert Reimann and David Cronin
- *Observing the User Experience* by Elizabeth Goodman, Mike Kuniavsky, and Andrea Moed
- *Mental Models* by Indi Young
- *Lean UX* by Jeff Gothelf

Blog Posts

- *"Four seconds of silence"* by Chris Noessel, Cooper
- *"The KJ-Technique: A Group Process for Establishing Priorities"* by Jared Spool, UIE
- *"Affinity Map"* by Dave Gray, Gamestorming